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L A T E N E W S*

The Food and Agriculture Organization of the United Nations has called a 1-week meeting of national and international food organizations in order to coordinate efforts now being made to meet the grave crisis arising from world food shortages.

Formation of a coffee organization to be known as "Federacion Cafetalera de Centro America y Mexico" is now underway. Recent despatches report the presence in Guatemala of a delegation representing coffee growers of El Salvador. This delegation previously visited Costa Rica, Nicaragua, and Honduras. They plan to proceed to Mexico City from Guatemala. The objective of the visits to the Capitals of Central America and Mexico is to urge Congressional approval in these countries of the proposed organization. The purpose of the Federation will be to assist in the marketing of all mild coffee produced in Central America and Mexico. The annual production of mild coffee in the six countries concerned in the proposed organization is 5 million bags of 132 pounds each. This is about equal to the annual production of Colombia which also markets a mild type of coffee.

An international conference examining the question of overfishing opened in London on March 25. The following countries are represented at the Conference: Norway, Sweden, Poland, Denmark, Holland, Belgium, France, Portugal, Spain, Eire, Iceland, and Great Britain. The International Council for the Exploration of the Sea, which has for many years given attention to the problem of overfishing, also is represented. The objective of the Conference is to draw up ~~a~~ regulatory agreement among the nations concerned to prevent depletion of stocks of fish in the North Sea.

Food conditions in France, French North Africa, and Italy were reported by former President Hoover as being difficult but not intolerable provided present rations can be maintained. These rations provide for a total daily calorie intake for normal consumers as follows: France, 1930; French North Africa, 1,500; and Italy, 1,500. Conditions vary greatly within each country owing in part to transportation difficulties. In addition to rations for normal consumers, various supplemental supplies are available for special categories, such as heavy workers, children, and the sick. Milk is largely restricted for use by children.

Prohibition of the exportation of Chilean oats from the 1945-46 crop is reported as having been approved by the Chilean Ministry of Agriculture, March 18. The 1945-46 oats crop is now in the final stages of harvesting. The prohibition was said to be necessary in order to assure a sufficient supply of oats for domestic utilization during the coming year. The 1945-46 crop was estimated at 88,000 short tons, or about 22 percent under that of a year ago. Prior to the war Chile usually figured as a substantial exporter of oats and oat products, exporting a total of 70,510 short tons in 1937 and 61,490 short tons in 1938.

*This section is continued on page 206.

WORLD CATTLE NUMBERS IN 1945 AND 1946

Preliminary reports for 1946 indicate 2 million fewer cattle than in 1945 in North America, 6 million less in Europe, but about 3.7 million more in the Soviet Union. Elsewhere in the world, however, cattle numbers at the start of 1946 showed little net change. At the beginning of 1945, world cattle numbers were estimated at about 710 million head.

Some increases are expected in cattle numbers in the next year, especially in those countries where declines occurred during the war. On the other hand, some decrease is expected in Germany along with a probable decline in North America. Because cattle feed more upon pastures and roughages the present world shortage of grain and feed will have less effect on cattle than on hog and chicken numbers.

The 1945 world cattle estimate of 710 million head is only about 2 million head less than 1944 numbers, but 13 million head, or 2 percent, below the 5-year (1936-1940) average, when numbers were at relatively high levels, especially in Europe. In comparison, world cattle numbers averaged 695 million head for 1931-1935, 687 million head for 1926-1930, and 642 million for 1921-1925.

Changes in cattle numbers from prewar (1936-1940) years to 1945 in the different regions of the world have been more significant than for the over-all total. Because of the war, numbers dropped 12.6 million head in Europe, or 11.4 percent; 19.3 million head in Asia, or 6.8 percent; and about 10.7 million head, or 22 percent in the Soviet Union. On the other hand, moderate increases occurred in Africa, South America, and Oceania and a large increase of 16.8 million head, or 17-percent rise in North America. The increase in North America followed the upswing in the cattle cycle from the moderately low levels reached in 1938 following the severe drought conditions in the middle 1930's.

In the United States, cattle numbers on January 1, 1946, were 2.1 million head less than a year earlier, a drop that continues the downward movement in the cattle cycle that started in 1944. The decrease in numbers reflects the record slaughter of cattle and calves in 1945 and is an orderly downward adjustment of cattle numbers from the record peak at the beginning of 1944. Most of the decline in 1945 was in milk stock - cows, heifers, and heifer calves - with beef cows and heifers 2 years old and over showing some increase.

Cattle numbers in Canada for the beginning of 1946 (December 1945) were recently reported at 10 million head, compared to 10.3 a year earlier and 9.5 at the beginning of 1944. The decline during 1945 reflects the heavy marketings reported throughout 1945 which are continuing into 1946. Canadian officials have considered it advisable for producers to take advantage of the good market for beef and reduce cattle numbers, both beef and dairy type, by liquidating stock of inferior quality. Canadian

CATTLE: Number in specified countries, averages 1931-35 and 1936-40, annual 1940-1946

Continent and country	Month of estimate 1/	Average 1931-35	Average 1936-40	1940	1941	1942	1943	1944	1945 2/	1946 2/
		Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands	Thousands
North America										
United States	Jan. 1	68,465	66,684	68,197	71,461	75,162	79,114	82,364	81,909	79,791
Canada	Dec. 1 1/	3/ 8,250	8,246	8,224	8,316	8,249	8,834	9,506	10,258	9,961
Mexico	June	4/ 10,083	3/ 11,722	11,603	-	-	-	5/ 12,000	-	-
Guatemala	July	409	520	605	612	630	729	657	-	-
Honduras, Republic of	July	611	524	560	-	645	-	500	-	-
El Salvador	July	520	680	705	716	743	673	-	-	-
Nicaragua		4/ 800	4/ 700	700	-	-	-	800	-	-
Cuba	Dec. 31 1/	4,340	5,024	4,900	5,335	-	4,897	(4,500)	(4,000)	-
Estimated total 6/		96,000	96,600	98,100	-	-	-	113,600	113,400	-
Europe										
United Kingdom	June	8,462	8,798	9,093	8,940	9,075	9,259	9,501	9,624	-
Eire (Ireland)	June	4,059	4,021	4,023	4,150	4,084	4,136	4,243	4,210	-
Norway	June	1,323	1,390	-	(1,300)	(1,280)	(1,250)	(1,280)	(1,270)	-
Sweden	Summer	3,025	2,959	(2,870)	2,757	2,546	2,790	2,859	(2,880)	(2,900)
Denmark	Dec. 31 1/	4/ 2,997	3,108	3,186	2,976	2,833	2,760	2,933	3,036	3,041
Netherlands	May	3/ 2,734	2,693	2,690	2,659	2,441	2,058	(2,100)	2,277	-
Belgium	Dec. 31 1/	1,793	1,724	1,600	7/ 1,828	7/ 1,759	7/ 1,407	7/ 1,392	7/ 1,440	1,539
Luxemburg	Dec. 1 1/	101	3/ 108	107	-	-	121	129	(105)	(110)
France	Fall 1/	15,616	15,504	8/ 14,662	8/ 14,857	8/ 15,991	8/ 16,282	8/ 14,997	8/ 13,960	14,795
Spain	Dec. 31 1/	3/ 4,011	4/ 3,739	3,739	3,897	3,900	3,950	4,152	(4,100)	3,808
Portugal	Dec. 31 1/	9/ 905	9/ 905	-	973	(960)	(1,040)	(1,090)	(1,070)	-
Switzerland	April	1,636	1,663	1,695	1,584	1,493	1,517	1,497	1,461	-
Italy	March	4/ 7,090	7,571	7,790	10/	10/	(8,000)	(6,500)	(6,100)	-
Germany	Dec. 1 1/	19,134	19,881	19,948	19,668	19,432	19,102	19,598	20,286	(15,000)
Austria	Dec. 3 1/	4/11/ 2,349	3/ 2,578	2,560	-	-	-	2,530	(2,500)	2,117
Czechoslovakia 12/	Dec. 31 1/	4,392	(4,820)	(5,000)	-	(4,800)	(4,600)	(4,600)	(4,400)	(4,000)
Poland	June 30	9,450	(9,965)	-	-	(7,000)	(6,800)	(6,600)	(5,500)	-
Hungary 12/	March	1,759	3/ 1,881	-	-	-	-	2,160	(850)	(900)
Yugoslavia 12/	Dec. 31 1/	3,911	4,181	4,263	-	-	-	(2,500)	(2,600)	(2,800)
Greece 12/	Dec. 31 1/	937	3/ 1,041	-	-	-	-	(480)	(520)	(580)
Albania 12/		393	3/ 413	-	-	-	-	(320)	(330)	(350)
Bulgaria 12/	Dec. 31 1/	9/ 1,873	3/ 1,822	1,772	1,839	13/ 1,991	13/ 2,112	13/ 1,785	13/ 1,673	13/ (1,500)
Rumania 12/	Dec. 31 1/	4,332	4,399	4,443	-	-	-	14/ (4,000)	14/ (3,500)	14/ (3,600)
Lithuania	Dec. 31 1/	1,109	1,188	1,240	-	-	(940)	-	-	-
Latvia	June	1,172	(1,243)	-	-	(1,100)	(1,000)	-	-	-
Estonia	June	689	(647)	-	444	11/ 466	-	1/ 461	1/ (350)	-
Finland	September	1,792	1,893	1,770	11/ 1,590	11/ 1,488	11/ 1,721	11/ 1,859	11/ 1,673	-
Estimated total 6/		107,100	110,200	107,400	105,900	104,200	102,300	101,500	97,600	-
Soviet Union	Jan. 1	3/ 36,900	3/ 48,500	5/ 49,500	-	-	-	(35,000)	(37,800)	(41,500)
Asia										
Turkey 12/ 15/	Dec. 31 1/	5,584	7,177	8,215	8,463	8,673	8,278	7,821	(8,000)	(8,200)
Iraq 12/ 15/	Spring	(310)	3/ 374	-	-	-	484	466	-	-
Iran	March	2,167	2,797	-	5/ 2,000	1,960	-	-	-	-
Palestine	Spring	4/ 160	4/ 169	-	-	-	243	-	-	-
India 12/	Dec. 31 1/	198,474	3/ 205,863	208,039	-	-	-	(200,000)	(200,000)	-
Burma 12/	Dec. 31 1/	6,226	3/ 6,183	-	-	-	-	-	-	-
Ceylon 12/	Dec. 31 1/	1,617	1,618	1,628	1,693	1,760	-	-	-	-
China and dependencies 16/		3/ 25,000	(24,000)	(22,000)	-	-	-	(21,000)	(21,000)	-
Japan	Dec. 31 1/	1,543	1,794	1,967	5/ 2,096	-	-	-	-	-
Formosa 12/	Dec. 31 1/	384	354	325	5/ 300	-	-	-	-	-
Thailand 12/	March	10,047	3/ 11,017	-	-	-	-	-	-	-
Philippine Islands 12/	Dec. 31 1/	3,493	3/ 4,000	-	-	-	-	-	-	-
Netherlands Indies 12/	Dec. 31 1/	8,084	7,672	7,824	-	-	-	-	-	-
Estimated total 6/ 17/		272,400	283,000	285,000	-	-	-	266,600	263,700	-

Africa										
Morocco 15/	Dec. 31 1/	1,994	1,973	1,871	2,048	2,381	2,675	2,749	3,023	1,814
Algeria	Mar. 1	879	837	829	843	911	893	896	(850)	-
Tunisia	Dec. 31 1/	523	494	479	487	510	553	529	501	500
Egypt 12/	March	1,768	3/ 2,021	-	-	1,903	18/ 2,203	(2,200)	18/ 2,329	-
Anglo-Egyptian Sudan		1,790	3/ 2,700	-	-	5/ 3,000	-	-	-	-
Kenya	July	5,209	3/ 5,239	-	-	5/ 5,245	-	-	-	-
Union of South Africa	August	10,497	11,636	12,000	-	-	13,068	(13,100)	(13,000)	-
Rhodesia, Southern	Dec. 31 1/	2,616	2,344	2,326	2,463	2,634	2,680	2,743	(2,800)	-
Tanganyika	Dec. 31 1/	5,182	5,000	5,209	-	-	-	5/ 6,000	-	-
Mozambique		529	552	577	563	527	556	-	-	-
Madagascar 15/	Dec. 31 1/	6,380	5,172	5,266	5,457	5,640	5,934	5,957	5,913	-
Estimated total 6/		60,300	61,100	62,400	-	-	-	67,700	67,900	-
South America										
Colombia	Dec. 31 1/	3/ 7,730	3/ 8,010	-	-	9,325	10,934	11,456	12,334	5/ 13,000
Ecuador		3/ 1,370	3/ 1,300	-	1,185	1,160	1,120	1,200	(1,200)	-
Bolivia	Dec. 31 1/	3/ 2,064	3/ 1,921	5/ 2,000	-	-	2,445	(2,400)	(2,400)	-
Chile	June	3/ 2,426	2,489	2,421	2,418	2,346	2,391	2,306	5/ 2,400	-
Brazil	September	3/ 44,003	3/ 40,807	41,546	-	5/ 46,000	5/ 42,500	(42,000)	(42,000)	-
Uruguay	April	3/ 7,372	4/ 8,297	-	-	5/ 7,300	6,256	(6,300)	(6,300)	-
Paraguay	Dec. 31 1/	3,383	3,259	3,507	-	3,850	3,500	(3,300)	(3,300)	(3,500)
Argentina	July	3/ 31,540	3/ 33,762	-	19/ 33,750	19/ 31,460	-	(33,500)	34,010	-
Estimated total 6/		104,900	105,600	107,700	-	-	-	108,900	110,400	-
Oceania										
Australia	Dec. 31 1/	12,865	13,285	13,080	13,256	11/ 13,561	11/ 14,005	11/ 14,184	11/ 14,133	-
New Zealand	Jan. 31	4,188	4,449	4,533	4,576	4,642	4,485	4,476	4,626	-
Estimated total 6/		17,300	18,000	17,900	-	-	-	18,900	19,000	-
Estimated world total 6/		694,900	723,000	728,000	-	-	-	712,200	709,800	-

Offices of Foreign Agricultural Relations. Annual data are from official sources, except figures in parentheses, which are office estimates, and relate to prewar boundaries. Data for some averages are obtained from publications of the International Institute of Agriculture.

1/ End of year estimates (October to December) included under following year for comparisons and totals. Thus for Canada the Dec. 1, 1939 estimate of 8,224,000 is shown under 1940. 2/ Preliminary. 3/ Average for 2 to 4 years only. 4/ Census or estimate for single year. 5/ Unofficial estimate. 6/ Totals include estimates for countries for which official statistics are unavailable. 7/ Official wartime statistics; not strictly comparable with estimates for other years. 8/ Official statistics plus an allowance for Alsace Lorraine. 9/ Census, December 31, 1934. 10/ Censuses for June 30, 1941 and July 20, 1942 reported 8,488,000 and 8,372,000, respectively, but are not comparable with March estimates for other years. 11/ March. 12/ Data include buffaloes. 13/ Includes Southern Dobrudja. 14/ Excludes Southern Dobrudja. 15/ Data include only number taxed. 16/ Free and occupied China, including Turkestan, Manchuria and Inner Mongolia. 17/ Includes estimates for Outer Mongolia, which are now available. 18/ June. 19/ September.

farmers are now marketing about 1.7 million cattle yearly, compared to a 5-year (1935-1939) average of 1 million head.

Cattle numbers in Cuba dropped to 4 million head in early 1945 in continuation of the downward trend begun in 1942. Following the prolonged drought ending in June 1945, weather conditions have since been favorable for pastures, and an upswing in cattle numbers is expected in 1946. The strong demand for meat, however, will partially offset the tendency toward an increase in cattle numbers.

Poor grazing conditions in Mexico during much of 1945 and inadequate supplies of water caused some losses of cattle, especially in the northern States of that country. A smaller calf crop and heavy shipments of cattle are believed to have reduced numbers below the 12 million head estimated for the country in 1944.

Cattle numbers continue to increase in the United Kingdom as a result of greater emphasis placed upon milk production for fluid consumption. There is a marked tendency, however, for cattle other than milk stock to increase also. Imports of store or feeder cattle in 1945 from Eire were about 50,000 head greater than for a year earlier. Cattle numbers in Eire in June 1945 were not as large as expected because of heavy slaughter of calves. Continued heavy calf slaughter, together with larger shipments of cattle to the United Kingdom, is expected to result in smaller cattle numbers in June 1946 than a year earlier.

As a result of programs of the Norwegian Government, cattle herds are expected to be rebuilt as quickly as feed and forage will permit. By adjustments in prices, livestock production is to be encouraged in remote regions formerly at a disadvantage because of transportation costs. Cattle numbers in Sweden compare favorably with prewar, and the output of animal products in recent months has been high. The feed situation improved with increased shipments of concentrates during October, November, and December. Furthermore, Sweden has enjoyed a mild winter and the general condition of cattle is good. Cattle numbers in 1946 are expected to show some increase over last year. In Denmark, cattle numbers at the beginning of 1946 were slightly larger than a year earlier despite heavy exports of beef and live cattle, including quantities to the British Army in Germany.

Cattle numbers in Belgium on January 1, 1946, showed an increase of about 100,000 head over a year earlier. The gain is almost entirely accounted for by the rise in the number of heifers. During the next 2 or 3 years, a rise of about 200,000 head in the number of Belgium dairy cows may be anticipated.

French cattle numbers for the fall of 1945 are reported at 14.8 million head, an increase of 6 percent over a year earlier, and present numbers are placed at only 5 percent below prewar levels.

In central and southern Spain, pastures were unsatisfactory in 1944 and 1945. Shortages of feed, including hay and other roughage, became

acute in 1945, and cattle slaughter during summer and fall months was above normal, which resulted in a decline in total numbers. Rains at the close of the year followed by good winter moisture conditions have greatly improved the situation. Portugal also suffered from drought in 1945 with some reduction in cattle numbers.

In the summer of 1945 drought conditions prevailed over much of southern Europe including Switzerland, Italy, Greece, and the Balkan countries. Mild weather during the fall and winter, however, has favored pastures and livestock. Some increase in numbers is expected to be shown in 1946 in most countries in this area. Switzerland and other countries have a higher-than-average number of young stock for breeding, which will aid in restoring numbers to prewar levels.

In Central Europe, the final phases of the war and subsequent events brought a considerable drop in cattle numbers. These losses were greatest in eastern Germany, Czechoslovakia, Hungary, and Austria. Losses in Austria do not now appear as heavy as earlier reported. In lower Austria, for example, which was heavily affected by hostilities. cattle numbers at the end of 1945 were found to be 72 percent of the prewar numbers and not 20 percent as earlier reported by Austrian authorities. For all of Austria, cattle numbers at the end of 1945 were 82 percent of the 5-year (1936-1940 average.

Losses in Czechoslovakia in 1945 were attributed largely to requisitioning by occupying forces which reduced cattle numbers to an estimated 4 million head, compared to 4.4 at the beginning of 1945, and 4.8 for the 5-year (1936-1940) average.

Cattle numbers within the prewar boundaries of Germany are estimated to have been 25 percent smaller in the fall of 1945 than a year earlier, when the total was 20 million head, or about prewar levels. Very heavy losses occurred in eastern Germany, both in the area to go to Poland and in the area occupied by the Soviet Union. Losses have been less in other zones with the December 1945 cattle numbers in the United States zone reported at only 5 percent below prewar levels. This number will, however, be reduced gradually as the production of direct food crops is increased at the expense of the livestock industry.

Because of further losses in Poland in 1945, cattle numbers in that country are now only about half of prewar levels. Polish authorities have placed restrictions upon meat consumption in order to protect the remaining cattle and to make it possible to build up the herds.

Cattle numbers in the Soviet Union are reported by the press in that country to have increased by 6 percent in the first 8 months of 1945. Part of this increase is attributed to the acquisition of cattle from former Axis countries. According to the 5-year plan announced recently the Soviet Union has set a goal for cattle numbers in 1950 at 39 percent above prewar levels.

Smaller cattle numbers in Asia in 1944 and 1945, in comparison to prewar levels, are accounted for largely by a drop in numbers in India, Burma, China, French Indochina, Formosa, and the Philippines. Most of the losses are attributed to the war, but the large decline in India is ascribed to droughts and poor crops, including pastures and forage.

In Africa, a sharp decline occurred in cattle numbers in Morocco during 1945 following several months of very dry weather. Drought in the Union of South Africa also has reduced cattle numbers. Elsewhere cattle numbers are little changed.

Cattle numbers in South America in 1945 show some increase over the previous year. As a result of a census taken in mid-1945, Argentina reports 34 million head of cattle, compared to 31.5 million head in September 1942. The 1945 number is believed to represent an increase over 1944. The breeding area in Argentina is reported to be well stocked, but the movement to the fattening area, where weather conditions were less favorable, has not been correspondingly increased. Improved pasture conditions during most of 1945 in Paraguay, Uruguay, and Brazil are believed to have brought some increase in cattle numbers over the levels prevailing in the previous 2 years. In addition, slaughter in Brazil was restricted during much of 1945 which increased cattle holdings especially in Central Brazil.

In Australia, cattle numbers show little change during the past 2 years in spite of the severe drought throughout much of the country. The beef cattle area in Queensland was least effected, and although the milk production in the costal areas of other states was reduced, dairy herds were fairly well maintained. Not much change in actual cattle numbers has occurred in New Zealand in the past 2 years. The smaller numbers reported in 1943 and in 1944 are partially due to faulty reporting of young stock.

This is one of a series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, chairman, C. M. Purves, Floyd E. Davis, Hazel B. Kefauver, R. J. Manovill, F. S. Straus, and Oscar K. Moore.

C O M M O D I T Y D E V E L O P M E N T S

GRAINS, GRAIN PRODUCTS, AND FEEDS *

ARGENTINE RICE ACREAGE SMALLER

Argentina's 1945-46 rice acreage is reported at 122,000 acres in the third official estimate, which is 5 percent smaller than the final

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* The remainder of the Grain Section appears on page 205.

estimate of 128,000 acres in 1944-45. Information about the crop harvested from February to April has not been received. The area this year is more than twice the prewar (1936-37 to 1940-41) average of 56,000 acres. Argentina at that time imported an average of 40 million pounds annually, but as a result of increased production, the surplus from last year's crop was sufficient to establish in January 1946 a rice-export quota of 22 million pounds.

HONDURAS HARVESTS
RECORD RICE CROP

The Honduran rice harvest from September to December 1945 amounted to 1,156,000 bushels (34 million pounds milled), compared with the short crop of 800,000 bushels (23 million pounds) in the preceding year, according to a report from Tegucigalpa. This record outturn is more than double the prewar (1937-1941) production of 525,000 bushels (15 million pounds), during which time an average of 2 million pounds were imported. Despite the apparent surplus from the 1945 crop, exports may be negligible since domestic prices are higher than those paid by importing countries. The wholesale domestic price for clean rice was $8.82 per 100 pounds in February. Because of high prices paid for rice this season, acreage planted principally in April-May is expected to be large again in 1946.

FATS AND OILS

U. S. TO PURCHASE
URUGUAYAN FLAXSEED

An arrangement between the Uruguayan and United States Governments for the purchase of flaxseed has been completed. Terms of the agreement call for buying the available supply of Uruguayan flaxseed from the 1944-45 crop and exportable surplus from the 1945-46 harvest. The price is $2.275 per bushel f.o.b. Montevideo. An allowance of 10 cents per bushel has been authorized on an unspecified quantity of the old seed to compensate in part for accrued carrying charges. The Commodity Credit Corporation will do the buying, and flaxseed will be distributed in accordance with recommendations of the Combined Food Board.

CANADA SETS PRICE RISE
FOR FLAXSEED PRODUCERS

Effective August 1, 1946, the Canadian Government will buy flaxseed from producers at $3.25 (Canadian currency) per bushel for No. 1 C. W., basis Lakehead or Vancouver. This is an increase of 50 cents per bushel over the $2.75 now being paid. In making this announcement, the Minister of Trade and Commerce urged producers to seed a large acreage to flaxseed this year. A goal of 1,250,000 acres was recommended by the Dominion Provincial Conference. This represents an increase of 18 percent over the 1945 acreage. The present programs for rapeseed and sunflower seed will be continued through the 1946-47 crop year, with guaranteed prices of 6 cents and 5 cents per pound, respectively, basis country shipping points.

ARGENTINE SUNFLOWER
AREA AT RECORD LEVEL

The Argentine sunflower-seed area for 1945-46 is placed at 4,002,773 acres, according to the third official estimate. This is the largest sunflower acreage on record and 43 percent greater than that harvested in 1944-45. The increase is attributed to favorable marketing prospects foreseen for this oilseed, which factor stimulated producers to sow sunflower seed in those fields where grains and flaxseed crops had failed. Harvesting began in March, but will not likely be completed until the end of April.

WORLD RAPESEED
OUTPUT SMALLER

World rapeseed production in 1945 is estimated at 4.3 million short tons, approximately 13 percent less than the 1944 output and 10 percent smaller than the prewar (1935-1939) average. With the outbreak of war, tremendous expansion in acreage took place in Europe, principally in Germany and in areas under German domination. When Germany was defeated, however, output declined. In 1945, European production, which accounted for about 19 percent of the total world crop, was 35-40 percent less than in 1944.

In China and India, which produced about 51 and 29 percent, respectively, of the world output in 1945, only relatively small fluctuations occurred during the war. Argentina is the major producer of rapeseed in the Western Hemisphere, which accounts for the remaining 1 percent of total world output.

Only about 3 percent of the annual world production of rapeseed entered international trade during the prewar (1935-1939) period, India, Rumania, China, and Argentina shipped approximately 80 percent of the yearly world export of rapeseed, or about 105,000 short tons, and Bulgaria, Hungary, and the Netherlands supplied the bulk of the remainder. The United Kingdom, Japan, and Italy were the principal markets for the seed. During the war the United States derived most of its rapeseed requirements from Argentina. German imports came from occupied European countries, and the United Kingdom depended chiefly on India for its rapeseed supply.

Rapeseed-oil shipments for 1935-1939 averaged only 27,000 tons, most of which were exported by Japan. Japanese mills crushed the seed, imported mainly from China, and exported the oil to the United States and Europe.

As other oil-yielding crops become readily available, European production most likely will decline in favor of other fats and oils as it did after World War 1. Asiatic production will probably continue for some time at comparatively high levels depending principally on the domestic demand and to a lesser extent on the market in Europe and the United States.

COTTON AND OTHER FIBERS

WEEKLY COTTON PRICES ON FOREIGN MARKETS

COTTON: Prices of certain foreign growths and qualities in specified markets

Market location, kind, and quality	Date 1946	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria (spot)		Kantar			
Ashmouni, F.G.F.	3-28	99.05 lbs.	Tallari	32.00	26.72
Giza 7, F.G.F.	3-28	99.05 lbs.	Tallari	36.25	30.26
Karnak, F.G.F.	3-28	99.05 lbs.	Tallari	35.50	29.64
Bombay (May futures)		Candy			
Jarila	3-29	784 lbs.	Rupee	458.75	17.63
Bombay (spot)		Candy			
Kampala, East African	3-29	784 lbs.	Rupee	850.00	32.66
Buenos Aires (spot)		Metric ton			
Type B		2204.6 lbs.	Peso		
Lima (spot)		Sp.quintal			
Tanguis, Type 5	3-30	101.4 lbs.	Sol	122.00	18.51
Recife (spot)		Arroba			
Mata, Type 5	3-29	33.07 lbs.	Cruzeiro	88.00	14.51
Sertao, Type 5	3-29	33.07 lbs.	Cruzeiro	92.00	15.17
Sao Paulo (spot)		Arroba			
Sao Paulo, Type 5	3-29	33.07 lbs.	Cruzeiro	112.50	18.54
Torreon (spot)		Sp.quintal			
Middling, 15/16"	3-29	101.4 lbs.	Peso	98.75	20.04

Compiled from weekly cables from representatives abroad.

TOBACCO

TOBACCO CROP DOWN IN PHILIPPINES

The Philippine 1945-46 crop of tobacco, harvested in March and April of this year, is estimated at only 27.9 million pounds, or a little more than one-third the average outturn of 75 million pounds during the period 1935-1939. Most of the crop will be produced in the Cagayan Valley and other areas on Luzon Island. Output in the other islands is reported to be negligible. Reports indicate, however, that tobacco plantings in the Philippine Islands for the 1946-47 season will be about normal.

Stocks of leaf tobacco in the Islands as of January 1, 1946, approximated 26 million pounds, according to trade sources. Most of these stocks were held in producing areas, and the stocks figure may be subsequently revised upon receipt of further information. Owing to excessive

transportation costs, tobacco is being moved to Manila for manufacture only to meet immediate requirements. The bulk of the leaf is reported to be from the large 1940-41 crop and is of very good quality.

Total requirements of domestic manufacturers from the January 1 stocks are estimated by trade sources at about 20 million pounds, leaving about 6 million pounds available for export. Small shipments of leaf have already been made to China and it is reported that negotiations are under way for the export of 1 million pounds to Spain. Exporters contend that former markets should be supplied with at least token quantities of leaf. Manufacturers, however, state that the exhaustion of present stocks of leaf before the 1945-46 crop is properly aged will result in premature usage of the new crop. The quality of cigars manufactured from insufficiently aged leaf would be considerably below standard, and might have an unfavorable effect upon demand for cigars in foreign markets.

FRUITS, VEGETABLES, AND NUTS

CUBAN PINEAPPLE PRODUCTION UP

Pineapple production for 1946 is estimated at 3.3 million crates, 18 percent above the 2.8 million produced in 1945 and 6 percent more than the recent peak crop of 3.2 million in 1943. The amount to be shipped as fresh and canned is not definite, but estimates place fresh fruit at 1.5 million crates and 0.9 million for canning. Acreage planted to pineapple is now estimated at 17,000 acres, compared with 14,852 acres in 1940. The new planting season begins in July, and planters will be influenced in extending acreage by market conditions in the United States during the peak season.

PINEAPPLES: Estimated production in Cuba, 1946 with comparisons

Year	For export a/				Domestic consumption	Total production
	Fresh	Canned	Brine	Frozen		
	1,000 crates	1,000 crates	1,000 crates	1,000 crates	1,000 crates	1,000 crates
Average 1940-1944	774	1,169	145	2	500	2,590
1945 b/	1,200	850	210	69	484	2,813
1946 b/	1,500	900	200	200	500	3,300

From official sources.
a/ Converted as follows: Fresh at rate of 80 pounds to a crate; canned, 41 pounds to a crate, and 2-1/2 crates of fresh per case of canned; brined, 300 pounds net pineapple converted to 18 crates of fresh pineapple per barrel; frozen, 21 pounds of frozen pineapple per crate of fresh.
b/ Preliminary.

The amount of pineapple canned this season is placed at 500,000 cases, but the exact figure depends to a large extent upon United States market

for fresh fruit during the peak shipping season. If the season is good, there will be less fruit available for canners at prices they can afford to pay. Tinplate is available, and large scale packing operations will begin during April. About 1 percent of the pack is consumed in Cuba, and stocks are usually small. Quick frozen pineapple for sale in the United States will probably establish a new record in 1946, and processers believe that 3 million pounds will be prepared. Because of lack of sugar in the United States there will be no increase in shipments of pineapple in brine.

MEXICAN BANANA OUTPUT LARGER

Mexican banana production in 1946 may show a slight increase over the 1945 crop of 19,617,000 bunches. During 1945, approximately 95 percent of the plants were damaged or destroyed by severe storms in Chiapas, record prices were recorded for domestic sales, extensive "black market" operations were reported in the export trade, and a decline in exports took place as a result of increased transportation difficulties. Supplies available for export in 1946 will probably exceed those exported during 1945, but actual shipments will depend on transportation facilities as well as on competition from other producing countries.

The production of Roatan bananas is now estimated at 13,228,000 bunches, a little more than the 13,032,000 produced in 1944. The decrease in Chiapas was apparently offest by increases in Veracruz, Tabasco, and Paxaca. Production of various other varieties is placed at 6,389,000 bunches, equal to the 1944 crop. Exports during 1945 amounted to 5,169,000 stems, a decrease of 11 percent from the 5,812,000 stems shipped during 1944. Ninety-nine percent of the 1945 exports went to the United States and the remainder to Canada.

BANANAS: Number of plants and production in Mexico, 1945 with comparisons

Year	Plants in production: Roatan	Plants in production: Other	Production: Roatan	Production: Other	Production: Total
	1,000 plants	1,000 plants	1,000 bunches	1,000 bunches	1,000 bunches
1942	7,604	6,295	11,993	6,125	18,118
1943	8,729	6,352	13,684	6,217	19,901
1944	8,987	6,300	13,032	6,389	19,421
1945	9,100	6,300	13,228	6,389	19,617

Compiled from official sources.

CUBAN BANANA EXPORTS RISE

Cuban banana exports during 1945 amounted to 1,180,000 bunches of 50 pounds, compared with 1,083,000 exported during 1944. Bananas are grown

throughout Cuba, but exports are limited to the Johnson or Gros Michel variety produced in the Oriente Province in eastern Cuba. Plantains, or cooking bananas, are usually shipped only from Habana, but there were no exports from that city in 1945 due to scarcity resulting from the hurricane in October 1944 and to the drought during the first half of 1945. Plantain exports from Cuba (Baracoa only) amounted to only 13,000 bunches of 50 pounds, compared with 96,000 exported during 1944.

LIVESTOCK AND ANIMAL PRODUCTS

CANADA AND U. K. RENEW MEAT AND DAIRY CONTRACTS

Arrangements have been made by Canada to extend into 1948 the British contracts to purchase most of the Canadian export surpluses of animal products. The following details on quantities and prices have been agreed upon by the two Governments (prices in Canadian money):

Bacon and Ham: Britain will take all the bacon and ham Canada can ship through 1948. The present contract is extended to cover the shipment of a minimum of 350 million pounds in 1947 and 400 million in 1948. The contract price for the balance of 1946 and 1947 has been increased to $25 per hundred pounds f.o.b. seaboard for grade A Wiltshires. For 1948 the price will be not less than the current contract price of $22.50, subject to later review. Before next January there will be further discussions to assess 1949 requirements and to negotiate the contract. The new price for bacon means an increase of approximately $3 per hog in price. The Canadian Government established in 1944 a premium of $3 on A's and $2 on B's per hog until 6 months after the war. The premium is to be decreased by $1 to $2 on A's and $1 on B's per hog. This will provide for a net increase of $2 per hog in price and premium combined.

Cheese: The present contract for supply of 125 million pounds cheese yearly will be extended to the end of March 1948 at current prices and for the year ending March 31, 1949, at prices to be fixed later.

Evaporated Milk: Contract at current basis price to be concluded for supply of 600,000 cases evaporated milk annually for 2 years ending March 31, 1948.

Dried Skim Milk: It was agreed that the United Kingdom should purchase 6.7 million pounds from the 1946 production of roller-dried skim milk powder.

Eggs: The United Kingdom desires to obtain increased quantities of Canadian shell eggs from October to April inclusive, and more especially from October to December inclusive. Owing to difficulties in handling supplies in the United Kingdom during the summer months, Canada was requested to cease shipments of shell eggs by May 1 of each year and to divert the summer surplus to the production of frozen malange and/or sugar-dried eggs.

It was agreed that the current contract which expires on December 31, 1946, should be extended to cover the supply to the United Kingdom of 1,750,000 cases of shell eggs and 5,000 tons of dried eggs in 1947 at the current basis price for the shell eggs.

The United Kingdom has agreed to furnish to Canada by the autumn of 1946 (preferably by October) an indication of the requirements of eggs in shell and dried or frozen form during 1948.

Beef and Mutton: In order to maintain the wartime carcass meat ration, the United Kingdom will require all the beef and mutton which Canada can spare in 1946 and, so far as can be foreseen at present, in 1947 and probably in 1948. It was agreed to continue discussions of the extension of the current contract to cover supplies for 1947.

The United Kingdom will be ready to purchase all the hog casings which Canada can provide up to 1948. Offals and tongues will also be required and these will be the subject of further discussions.

The United Kingdom requested an increase in the export in carcass form of meat suitable for sausage manufacture.

NEWS BRIEFS

Mexico Sets Subsidy on Native Wool Use: To encourage the use of native wool, Mexico has decided to pay a subsidy of 1.50 pesos for each kilogram (14 United States cents per pound) of greased native wool bought by domestic manufacturers. The subsidy is credited toward duties charged on the manufacturer's imports of foreign wool. According to the Resolution of the Ministry of Finance of February 13, 1946, the subsidy will remain in effect until September 15, 1946.

Polish Wool Industry Revives: A cabled report to the Office of Foreign Agricultural Relations from Warsaw contains the announcement by the Central Management of the Textile Industry that during the months March - December 1945, Poland imported 4,253,000 pounds of raw wool from the Soviet Union and 12,450,000 pounds from UNRRA. Imports into Poland in the 5-prewar (1934-1938) years averaged 44 million pounds annually.

GRAINS, GRAIN PRODUCTS, AND FEEDS (con't)

CANADA'S 1946-47 GRAIN PROGRAMS ANNOUNCED

The Canadian wheat marketing program for the crop year beginning August 1, 1946, provides for continuation of the present payment of $1.25 per bushel (about $1.14 in United States currency) basis No. 1 Northern in store at Fort William-Port Arthur or Vancouver.

The statement of the Minister of Trade and Commerce announcing the policy in late March indicated that no over-all restrictions on marketings of wheat during 1946-47 are planned. Temporary delivery quotas, however, are expected to be necessary early in the marketing season, as has been the case in past seasons, to distribute local elevator space as equitably as possible among producers.

The present coarse-grain program is to be continued for the 1946-47 season except that the advance equalization payment on barley marketed in Western Canada will revert to 15 cents per bushel, which was the rate paid until August 1945. Early in the 1945-46 season the short supply of barley in Canada made it necessary to curtail exports and to divert barley suitable for malting into feed use, with a resulting loss of premiums to producers. In order to compensate growers for the loss of revenue from the exports of malting barley, the advance on barley was raised to 20 cents per bushel and the premium on malting grades was discontinued. For the year beginning August 1, 1946, premiums of up to 5 cents per bushel will again become effective on malting barley.

Advance equalization payments of 10 cents per bushel on oats will be continued. The Government's guaranteed minimum price will remain at 45 cents per bushel based on No. 2 C. W. oats in store Fort Williams-Port Arthur. The guaranteed minimum price for barley will continue at 60 cents per bushel for top grades.

LATE NEWS (con't)

To encourage early marketing of wheat in Canada, producers who deliver their wheat between April 1 and June 30, 1946, were given the option of accepting payment at any time during 1946, 1947, or 1948. This plan was devised in order to encourage release of wheat by farmers who have been withholding their grain because its sale would make them liable to high income taxes.

Last year's severe drought in northern Chile has resulted in a great shortage of water for irrigation in that entire region. Owing to the lack of rain, nonirrigated pastures are in very poor condition. On the other hand, southern Chile has had one of the rainiest summers on record. The unseasonal rains and cold weather which started the last part of January have continued during the wheat harvesting season. This has not only hindered harvesting operations but also adversely affected the quality of the crop.

Existing control over prices and exports of tea from India will continue throughout the 1946-47 season. This decision was made recently by the Government of India in view of the international tea supply and demand position.